CMS Net

Program Eligibility

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Preface

Legend

In procedures on the following pages users will see various symbols used.

✔   When a procedure is described, the check mark indicates the result of an action.

➡   The arrow indicates a content note.

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Program Eligibility (CMSPE-25)

Overview   This chapter describes how:
- To generate a Program Services Agreement (PSA).
- To track the program eligibility process

**Steps to Access the
Program Eligibility Screen**

Step	Action
1	From the Primary Menu, select Eligibility. Press <Enter>. ✔ The Patient Identification screen displays.
2	Identify and select the patient.
3	Select program eligibility date range from the pop-up message. Press <Enter>. ✔ The Eligibility Menu screen displays.
4	Select Program Eligibility. Press <Enter>.

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Program Eligibility (CMSPE-25), Continued

Program Eligibility Screen (CMSPE-25)

From the Eligibility Menu (CMSEM-10), the user can select Program Eligibility (CMSPE-25). The user may generate a Program Services Agreement (PSA) and indicate the status of the PSA.

➡ Use the <Down Arrow> to move from field to field. Required fields or fields that the user can change are **bolded**.

```
CMSNET                    PROGRAM ELIGIBILITY                           CMSPE-25
Pt Nm: XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX   CCS#: 9999999   CIN: 99999999X 9
1) Gender: X  DOB: 99/99/9999  Lgl Co: XXXXXXXXX   REG=XXXXXX   MED=X    F/R=X
2) Pgrm Begin Date 99/99/9999 End 99/99/9999  CCS Elig Status XXXXXXXXX1XXXXXXXXXX

3) PSA Status xxxxxxxxxxxxxxxxxxxx+    4) Reason Not Required xxxxxxxxxxxxxxxxxx+
5) Date PSA Signed    99/99/9999      6) PSA Signed By        xxxxxxxxxxxxx+
7) Date Signed PSA Received 99/99/9999

8) Date PSA Printed   99/99/9999      9) Date PSA Due    99/99/9999

10)Date NOA Printed   99/99/9999




11) Comments  xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx
              Xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx
              Xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx



12) Last Update By XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX  13)  Date 99/99/9999
```

Important Note

The Program Eligibility screen can only be accessed if the status is "Eligible" after completing the Residential Worksheet, Financial Worksheet, and Medical Eligibility screens.

From Program Eligibility, a user can change the Pgrm Begin Date and Pgrm End Date for the current, program eligibility period.

➡ Refer to the **Date Ranges** section, "Pgrm Begin Date Restrictions" and "Pgrm End Date Restrictions" in this module.

CMS Net User Guide and Reference

Program Eligibility (CMSPE-25), Continued

Registration Status Check

If the registration status is "Closed", "Denied" or "Not Open" the following pop-up message displays:

```
Patient Registration Status is: (Closed,
Denied or Not Open).  Please update the
Patient Registration Face Sheet.
[Quit]
```

If the user presses <Enter> instead of selecting [Quit], the system displays the Patient Identification Screen.

Complete any necessary information and press <Enter> to display the Patient Registration Face Sheet. Continue entering required data.

➡ Return to the Eligibility menu and continue normal processing rules for program eligibility periods after this check.

Data Entry Fields

The following table identifies and defines the fields for data entry on the Program Eligibility screen.

➡ Use the <Down Arrow> to move from field to field.

Fld #	Field Name	Description/Comments
1	(header)	**DISPLAY ONLY**
2a	Pgrm Begin Date	**Required** The system displays the original date from the Pending Eligibility Screen User is allowed to edit.

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Program Eligibility (CMSPE-25), Continued

Fld #	Field Name	Description/Comments
2b	End	**Required** When 'Date Signed PSA Recvd' is filled on Program Eligibility screen this field will default with the date one year after the Pgrm Begin Date If 'Reason Not Required' is DX Only, this field shall default to 90 days from the "Pgrm Begin Date" Completing the End date will set the Annual Review tickler (ANN). User is allowed to edit
2c	CCS Elig Status	**Display Only** This status is populated from the Client Eligibility (CMSCE-10) CCS Elig Status
3	PSA Status	**Required** If user selects: • **Signature Pending** - The system generates a PSA and sets a 30-day PSA Due Tickler. The "PSA" tickler can be run in generate tickler/batch correspondence to follow up. • **Not Required** - The system moves the cursor to Reason Not Required and sets the Annual Review Tickler (ANN). • **Not Signed** – Prompts user to generate NOA after saving the screen. • **Signed** - The system moves the cursor to the Comment field and sets the Annual Review Tickler (ANN)
4	Reason Not Required	**Required** If "Not Required" is selected in PSA Status Values: • Medi-Cal Full Scope No SOC • Healthy Fam Only • MTP Only • Dx Only
5	Date PSA Signed	**Required** If " Signed" is selected in PSA Status No future dates allowed.

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Program Eligibility (CMSPE-25), Continued

Fld #	Field Name	Description/Comments
6	PSA Signed By	**Required** If Date Signed PSA Recvd is filled. Values: • Parents • Legal Guardian • Applicant
7	Date Signed PSA Received	**Required** [if " Signed" is selected in PSA Status] Defaults to date entered in 'Date PSA Signed' User can override
8	Date PSA Printed	**Display Only** Auto-fills with date PSA is generated
9	Date PSA Due	**Display Only** Auto -fills with date PSA Printed + 29 days (30 days from generation of PSA)
10	Date NOA Printed	**Display Only** Auto-fills with date NOA generated
11	Comments	**Optional** User can key up to three lines of information. Automatically populates Narrative.
12	Last Update By	**Display Only** Displays the user's name who modified any data
13	Date	**Display Only** Displays the date of the last change

Program Eligibility (CMSPE-25), Continued

Action Menu   The Program Eligibility Action Menu has four commands:

➡ Users can generate the PSA **and** a NOA from this screen.

Command	Action
Save	Save will: • Save the updated data, comments, and other non-letter-triggering actions to the screen **or** • Generate the PSA or NOA as appropriate
Reissue Letter	The system will cancel the most currently generated letter and print a new one. The Date Printed and the Date PSA Due will reflect the new values. The Send Correspondence function displays.
Cancel	The system will NOT save changes. The Eligibility Menu (CMSEM-10) will display.
Quit	The Action Menu will close, and it will refresh the Program Eligibility (CMSPE-25) screen.

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**Program
Eligibility
Branch Menu**

```
(?)   Narrative for Program Eligibility
 ( )   Mail Message for Program Eligibility
 ( )   Print Face Sheet
 ( )   Eligibility Main Menu
```

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Business Rules

Overview

These business rules apply when using the Program Eligibility screen.

The following eligibility requirements must be met in order to add or modify on this screen. If they are not met, all fields except Pgrm Begin date (field 2a) are deactivated:

- Medical Eligibility = 'E'
- Financial/Residential Eligibility status = 'Eligible' (header)

➡ If the PSA Status field has data, the user may edit. If no data is present, all fields except the Pgrm Begin Date will be deactivated.

PSA Status

The user can generate a Program Services Agreement (PSA) and indicate the status of the PSA

If any one of the eligibility requirements is not met, the **only** field that the user can modify is "Pgrm Begin Date". The rest of the screen is **display only**.

Pgrm Begin Date Rules and Restrictions

Rules for Pgrm Begin Date:

1. Program Eligibility screen (CMSPE-25) allows the user to <u>change</u> the "Pgrm Begin Date".

Restrictions for Pgrm Begin Date:

1. Pgrm Begin Date should not be on or after the patient's 21st birthday. (Otherwise requires system override by user.)
2. Pgrm Begin Date **cannot be prior or equal to any other** "Pgrm Begin Date".

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Business Rules Continued

Pgrm End Date Rules and Restrictions

<u>**Rules for Pgrm End Date:**</u>

1. Users can enter the "Pgrm End Date" on the Program Eligibility screen.

2. When the user enters a date in the "Date Signed PSA Recvd" field on the Program Eligibility screen, the "Pgrm End Date" fills with a default value of one year from the "Pgrm Begin Date".

3. If the 'Reason Not Required' field displays DX Only, the "Pgrm End Date" defaults to 90 days from the " Pgrm Begin Date "

4. If the PSA Status field displays Not Required, the Pgrm "End" Date defaults to one year from the "Pgrm Begin Date".

5. The system sets the annual review tickler (ANN) from the Pgrm "End" Date.

6. The Annual Review Ticker (ANN) shall be removed when:
    A case is closed for any reason other than "Residence Established in Another County".

7. Save": When there is a **previous** program eligibility period and a **new** 'pending' program eligibility period is established, upon Saving, the system will remove the Annual Review Tickler (ANN) for the previous program eligibility period.

<u>**Restrictions for Pgrm End Date:**</u>

The following restrictions apply for Pgrm End Date:

*   It **cannot** be before the "Pgrm Begin Date".

*   It should not be on or after the patient's 21st birthday. (Otherwise requires system override by user.).

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NOTES

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